

United Way of Mid-Hudson Valley

1. Q. Why are you pursuing a merger?

A. Over the past several years UWDC and OCUW have enjoyed a close working relationship in collaborating on several marketing and community programs. In addition, a number of employers that run workplace fundraising campaigns to support United Way are common to both organizations. Both organizations, as well as most nonprofit organizations in the area and country, have experienced challenges over the past several years in raising funds. Thus, two years ago UWDC and OCUW began a series of conversations to explore a merger between our organizations. The intent behind these discussions was to determine if joining forces would more effectively address our communities' needs and increase the resources available to invest in our communities.

2. Q. Has the final decision about going ahead with a merger been made?

A. Orange County United Way's Board of Directors and United Way of Dutchess County's Board of Governors voted on Oct. 20, 2010 to merge the two organizations into one.

3. Q. How long will it take to fully implement the merger? What is the timetable?

A. We are currently in the process of completing strategic organizational work which includes gaining approval of the legal aspects of the merger that involve United Way Worldwide, the IRS, the New York Attorney General and New York Department of State. Organizational and operational planning also is underway with a goal of completion by June 30, 2011, the end of the 2010-2011 fiscal year. We currently project the full integration of the combined organization would be completed within the first three years of the merger.

4. Q. What are the merged organization's goals for the near term and future?

A. The goals of the merged organization are to:

- a. Increase regional impact to improve the quality of services provided, targeting the most pressing community needs in the areas of Education, Income, and Health.
- b. Increase organizational capacity by maximizing efficiencies and effectiveness
- c. Maximize the full potential of financial support throughout the region.
- d. Capitalize on the strengths of each organization to realize their full potential

- 5. Q. How will community organizations, currently funded by United Way, benefit from a merger?**
- A. A combined organization can provide increased efficiencies and be more effective in providing services to address critical needs in the region. A combined United Way will be able to bring community organizations from both counties together to develop creative approaches to serve the community. From a practical point of view, community organizations that serve both counties will have one point of contact to apply for funding and grants.
- 6. Q. How will the merger benefit the individuals and families now being served by our funded nonprofits?**
- A. One of the outcomes of the merged organization is to increase capacity, returning more donor dollars to the region to address key community issues in the areas of Education, Income, and Health. Increased capacity will enable our combined organization to promote improvements in the quality and delivery of services to the community.
- 7. Q. What will be the value to our community as a whole of a merger?**
- A. Our community will benefit from a stronger United Way that will be able to make a greater sustainable impact in improving people's lives throughout the region. The new organization will present opportunities for greater relevancy and broader reach, community impact, efficiency and effectiveness, and financial support.
- 8. Q. What will happen to the money raised in each county?**
- A. Initially, money raised in each County will remain in each County. Longer term, as good stewards of donor dollars, we will look for opportunities to solve the most pressing needs throughout the region.
- 9. Q. Will a donor's designated gift be honored?**
- A. United Way will always honor a donor's wishes if he or she so designates their gift. We also will continue to encourage donors to contribute to the United Way community fund in order to make the greatest impact with the funds raised.
- 10. Q. How will United Way change in OC/DC when the merger is completed?**
- A. The most visible change you will see is a name change. The other major change will be the combining and sharing of best practices and the implementation of these practices into the merged organization.

11. Will fewer grants be awarded?

A. The expectation is that over time there will be an increase in revenue which will allow for more funds to be awarded. As we continue to address the issues of Education, Income and Health throughout the region, the method or process for awarding grants will continue to evolve. This may result in a change in number and mix of organizations being funded. Independent of the merger, this change is already underway in both organizations.

12. Q. How will grantees be chosen by the merged organization?

A. Organizations will be selected based on their ability to best address the issues of Education, Income and Health in the community.

13. Q. How will a merged organization be governed? Will a joint board initially be chosen?

A. A governance model recommendation is being developed at this time, and will be part of the merger approval process.

14. Q. Are there any cost efficiencies in operating a merged organization and will they benefit the community?

A. Initial cost efficiencies are not projected to be significant. Work in this area is underway for the development and implementation of a structure with the capacity to better serve the region through more effective and efficient programming and fundraising.

15. Q. Will the Orange and Dutchess offices be combined?

A. Initially offices will be maintained in each county. Longer term, optimal location or locations for the United Way will be determined.

16. Q. Will a merger affect current staffing?

A. The staffing model is being developed and will be part of the merger approval process.

17. Q. My company currently participates in both United Way campaigns. How will this merger affect our workplace campaign?

A. Workplace campaigns will be run more efficiently by a merged organization. Key campaign elements and messages will remain consistent with past years.

18. Q. Our local United Way has several initiatives that receive my support. What will happen to these programs and their related funds?

A. At this time, these initiatives will continue. Your continued support is greatly appreciated.

19. Q. Will sponsorship opportunities still be available?

A. Yes, sponsorship opportunities will continue and will be an integral part of fundraising strategies in a combined United Way.

20. Q. Will the merged United Way administer current government contracts?

A. Yes, the merged organization will honor existing contracts.

21. Q. Are these merger discussions/explorations between UWDC and OCUW unique in the United Way Worldwide system?

A. No, this is not a unique occurrence in the United Way Worldwide system.

- From 2004 to 2008, there were 83 mergers/consolidations among almost 1400 United Ways.
- In 2007, in New York, the United Way of Schenectady County and the United Way of Northeastern New York merged into the United Way of the Greater Capital Region.
- Currently, UWW is also working in the Tri-State Region (New York, New Jersey, and Connecticut) to promote consolidation, collaboration and mergers among its United Way partners.